National Council of Higher Education Loan Programs

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Jim Lynch, Chief Financial Officer

Kay Jacks, General Manager, Schools Channel

Helene Epstein, Deputy CIO

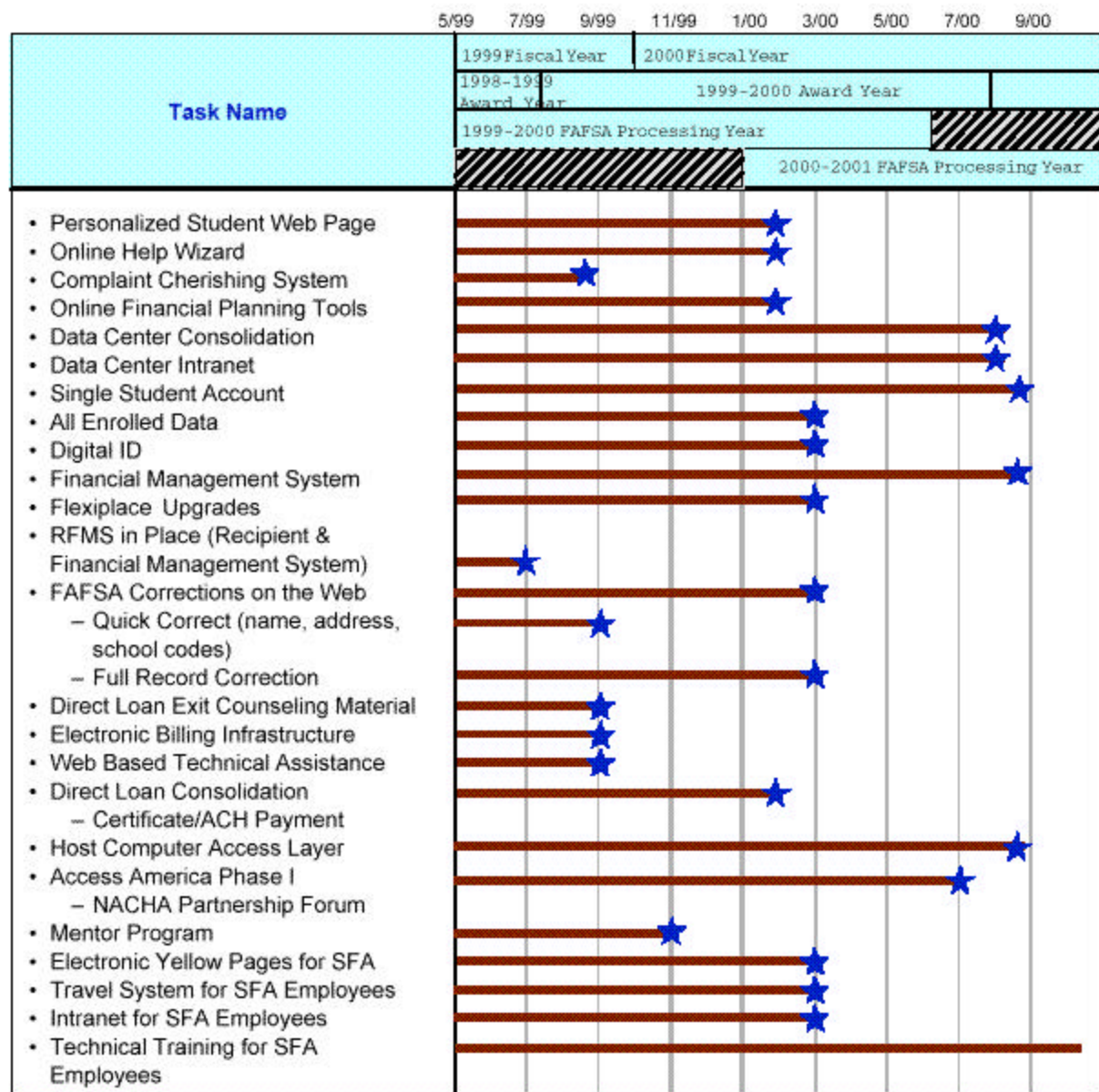NCHELP

Modernization Blueprint

- Recent Update: April Version
  - Executive Summary
  - Feedback Received
  - Town Hall Meeting

Modernization Blueprint

- Progress to Date

SFA Products and Services Progress on the September 1999 List

1999-2000 PROJECTS	STATUS/PROGRESS
(as reported September 30, 1999)	
Personalized Student Web Page	"Students.gov" has been subsumed into the future students portals and includes three major concepts: • Capability to make on-line changes to FAFSA on the Web • NSLDS can be directly accessed by students on the Web • Major upgrade to Direct Loan student Website (March 25, 2000)
On-Line Help Wizard	In progress. This is a feature of the schools portal that we are currently building and will become part of the Students portal in the future.
Complaint Cherishing System	Completed
Online Financial Planning Tools	See Enterprise Information System (EIS) section
Data Center Consolidation	Completion: Late 2000
Data Center Intranet	Completed
Single Student Account	Incorporated into the Common Origination and Disbursement initiative
All Enrolled Data	Signed agreement with the National Student Loan Clearinghouse. Capability up and running.
Digital ID	See Students Channel for use with student access and Financial Partners for FFELP pilots.
Financial Management System	Under Chief Financial Officer (CFO)
Flexiplace Upgrade	In progress, see Improved Organizational and Human Performance Projects
RFMS In Place	Completed
FAFSA Corrections on the Web	Many available, others in process
Direct Loan Exit Counseling Material	Completed
Electronic Billing Infrastructure	Incorporated into the Direct Loan Reengineering project.
Web-Based Technical Assistance	Two ways this has been done. IFAP on the web and SFA Technology.
Direct Loan Consolidation (Certificate/ACH Payment)	In progress, see Direct Loan Consolidation Re-engineering
Host Computer Access Layer	In progress, see Enterprise Integration
Access America, Phase I	See Highway 1 project for student access to personal financial aid data. See Access America Website for information for students. See Loan Servicing and Loan Consolidation under the Students Channel for additional on-line student services.
Mentor Program	See Enhanced Service Delivery for Financial Partners
Electronic Yellow Pages for SFA	In progress. This is an employee focused Intranet that currently focuses on enhanced customer service. This tool will allow SFA employees to forward all calls to the appropriate person.
Travel System for SFA Employees	Completion: April 2000
Intranet for SFA Employees	Completion: April 2000
Technical Training for SFA Employees	See SFA University

Task Name	1999 Fiscal Year	2000 Fiscal Year
	1998–1999 Award Year	1999–2000 Award Year
	1999–2000 FAFSA Processing Year	
		2000–2001 FAFSA Processing Year

Timeline: 5/99 7/99 9/99 11/99 1/00 3/00 5/00 7/00 9/00

- Personalized Student Web Page
- Online Help Wizard
- Complaint Cherishing System
- Online Financial Planning Tools
- Data Center Consolidation
- Data Center Intranet
- Single Student Account
- All Enrolled Data
- Digital ID
- Financial Management System
- Flexiplace Upgrades
- RFMS in Place (Recipient & Financial Management System)
- FAFSA Corrections on the Web
    - Quick Correct (name, address, school codes)
    - Full Record Correction
- Direct Loan Exit Counseling Material
- Electronic Billing Infrastructure
- Web Based Technical Assistance
- Direct Loan Consolidation
    - Certificate/ACH Payment
- Host Computer Access Layer
- Access America Phase I
    - NACHA Partnership Forum
- Mentor Program
- Electronic Yellow Pages for SFA
- Travel System for SFA Employees
- Intranet for SFA Employees
- Technical Training for SFA Employees

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Student Financial Assistance

- Moving Forward: Financial Partners Transformation
  - Process Reengineering
  - Enabling Technologies
  - Employee Transformation
  - Enhanced Service Delivery

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Sample Detail:
Key Milestones for two Initiatives in Schools:

Common Aid Origination & Disbursement:

- System & Middleware Development (October '00 – April '01)

- System & Middleware Testing (April '01 – February '02)

- Pilot Program Begins (February "02)

Web Portals Prototype for Schools:

- Prototype available for Review & Comment (June '00)

- Development of Version 1.0 of Prototype (July '00 – September '00)

- Version 1.0 of Schools Portal Available (September '00)

- (Features Include: Fully functioning IFAP, Some Personalization, Links to SFA Tech & SFA Download)

- Version 2.0 of Schools Portal Available (FY01 2nd Qtr)

- (Features Include: Reengineered IFAP, Increased Personalization, Links to operating system web sites)

- Version 3.0 of Schools Portal Available (FY01 4th Qtr)

- (Features Include: Direct Access to Operating Systems via Portal, on-line submissions & corrections, query and downloading of available data)

Descriptions and delivery dates for all the key milestones for the rest of the SFA Modernization Initiatives can be found in Chapter V. of the Modernization Blueprint

MASTER SEQUENCING PLAN

Initiatives

Students Channel :
1) Enhanced Aid Awareness
2) Enhanced Aid Application
3) Enhanced Loan Servicing
4) Enhanced Loan Consolidation
5) Enhanced Debt Collections
6) CRM Requirements Development - Students

Schools Channel :
7) Common Aid Origination and Funds Disbursement
8) Web Portals Prototype for Schools
9) CRM Requirements Development - Schools
10) Student History View (TBD)

Financial Partners Channel :
11) Financial Partners Process Reengineering
12) External Partners Process Reengineering
13) Enabling Technology for Financial Partners
14) Financial Partners Employee Transformation
15) Enhanced Service Delivery for Financial Partners

COO/Enterprise-Wide :
16) Integrated Customer Relationship Management
17) Enterprise-Wide Performance Management System
18) Integrated Human Resource System

CFO:
19) Financial Management Transformation (FMT)

CIO:
20) Cross Channel Enabling Technology
21) Enterprise IT Architecture
22) IT Methods and Standards
23) Consolidated Data Center (VDC)

Product Team Examples

- FP Core Process Reengineering

- Default Reduction Process Reengineering

- Common Third Party Interfacing

- Enhanced Partner Relationship Management

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- Use of internal SFA IntraNet to increase knowledge sharing and cross-organizational communication

- Developing standards, transform systems, processes and organizational structure to improve delivery and administration of Financial Aid with the community - use best practices, industry and government standards, and existing FFELP community experience

- **Develop Portals to provide consistent, single, user interface**:

  - Financial Partners - enable personalized access and submission of data in support of business requirements

  - School Channel - customized for schools but tailored to be used throughout higher education community

  - Future channel portals to enable enterprise wide connectivity

- Use of secured digital technology for 'on line' browser enabled processing

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- Reduction of paperwork and duplicate processes through electronic billing and invoicing, improved application processes, and regulatory reform

- Integrate a complicated loan origination process into a single, less complicated system

- Use standard Integrated Project Management approach to provide uniform methodology and incorporating partners throughout the community

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- PBO -- changing the way we do business in SFA with our customers and partners

- In Financial Partners, we are changing the way we do business...

  - GA/ Lender Payment

  - Contract management

  - Oversight and Technical Assistance

  - Policy and Analysis

- With our primary focus on:
  ## PARTNER UNDERSTANDING

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